



Reporting On Demand

While there are many reporting requirements that can be solved by automatically generating reports, there are many times when a report is required by a user entering some parameters and generating that report right there, on the spot.

For these particular requirements, **XLReporter** has provided a set of tools you can use to develop reports that users can interact with and get immediate results.

The following describes the steps necessary to configure an interactive report.

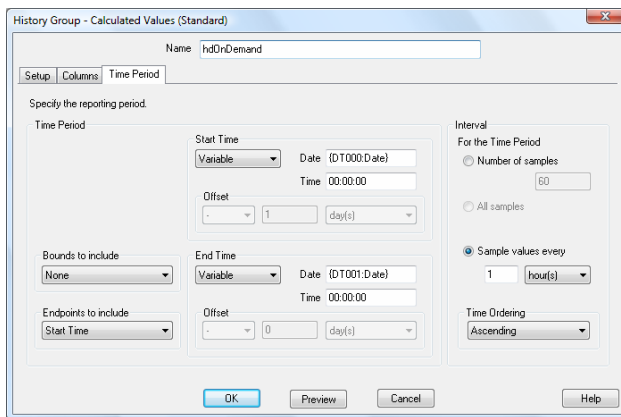
Defining Connections

Typically, an interactive report is derived from historical or database data.

The first step in designing an interactive template is to define the history group(s) or database group(s) that will retrieve the data for the report.

For settings that should be specified by the user at the time of report execution, select one of **XLReporter's** variables.

A good example of this is setting up a history group where the user can specify the start and end dates. To achieve this, set the Start Time and End Time of the history group to **XLReporter** variables.

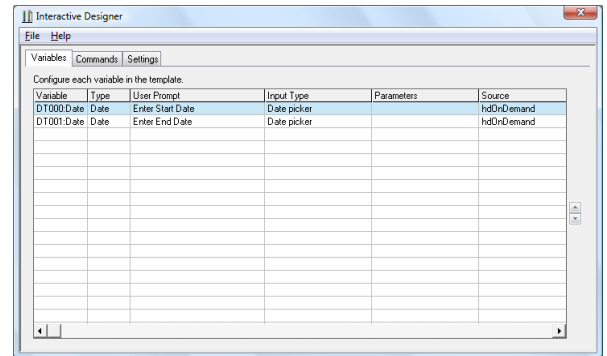


History Group Builder with variables

Designing the Interactive Form

Now that you have defined your history/database group (that contain variables) in the report template, the question becomes, how does the user access the variables without needing to edit the settings directly? The answer is, by designing an interactive form in **XLReporter's** Interactive Designer which is available from **XLReporter's** Form Design menu option in Excel.

When the Interactive Designer is opened from a template, you are presented with the variables used in the template. This list consists of every unique variable you have used in any history group, database group or function connected to the report template.



Interactive Designer – Variables Tab

For each variable, you can specify:

- **Type**
The type of variable it represents, e.g., Date
- **Prompt**
The prompt for the user to enter a value for the variable.
- **Input Type**
The control that the user will use to select the value of the variable. This could be anything from a simple text box to a date or time picker depending on the variable.

Once all the variables have been defined, you'll need to define the commands that will be used to generate the report. This is done under the Commands tab.

By default, 2 commands are configured for every interactive report. The first is an UpdateSheet. This is the command that will bring the data into the report.

The second command is a SaveSheetHTML. This command takes the completed report and converts it to HTML. This step is necessary when generating an interactive report from outside of Excel because that is the format the report will be shown in.



Interactive Designer – Commands Tab

Typically, these are the only commands that you need to generate the report. If you would like to provide a print option, you can do so by adding a PrintSheet command to the bottom of the list and have it execute On request.

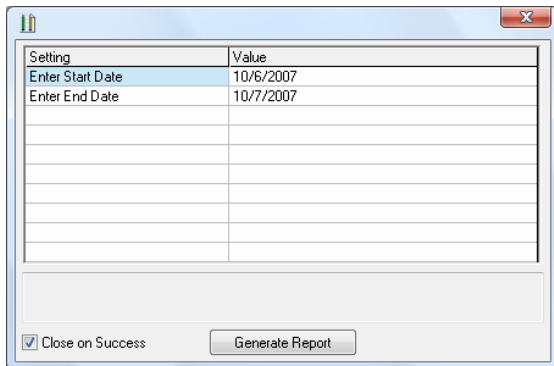
Finally, under the Settings tab, you can configure some custom settings for the interactive form.

The Form Caption setting allows you to specify the text that will appear at the top of the interactive form's window when it is launched.

On-demand Reports within Excel

The interactive form you designed is accessible in Excel from the **XLReporter** menu by selecting Report, Update.

You are presented with a form that prompts you for the value of each variable configured.



Interactive Report Form in Excel

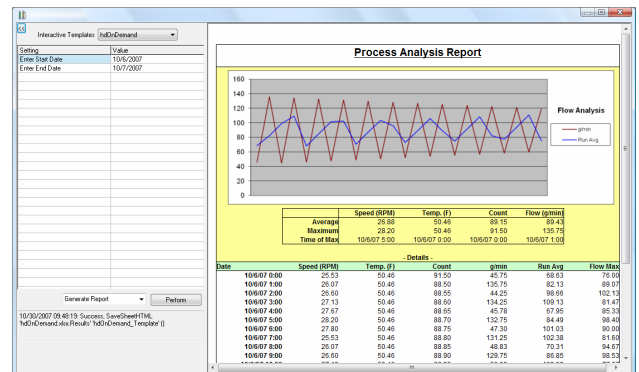
Simply specify the values and generate the report. A new report will appear in the open Excel template.

On-demand Reports from outside Excel

From outside Excel, the interactive form is also available. You can access it from the Project Explorer by selecting Interactive Reports, from a command line by running XLRiDisplay.exe or from a pushbutton from a HMI display by launching XLRiDisplay.exe.

When launched, a window appears with the form on the left containing all the variables. Again, just like from within Excel specify the values and generate the report.

The report itself will appear on the right side of the window as an HTML file.



Interactive Report Form outside of Excel

If you have configured a print command, that can also be run from here by changing the setting from Generate Report to Print Report.

When launching this window from a HMI display, you will want to utilize the "/t" command line switch. This switch tells the window to stay on top of the other windows. This will prevent the window from getting "lost" under the HMI display if the user clicks off the window.

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